

CLASS TITLE: TAX RETURN PROCESSING SUPERVISOR (TAXATION)

Class Code: 02687501

Pay Grade: 28A

EO Code: E

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: Within the Department of Revenue (DOR) Division of Taxation, to act as a working supervisor and plan and supervise of the work of a team within the Tax Return Processing Section; to plan, organize, coordinate, and supervise a staff engaged in performing a variety of mail processing, data entry functions, worklist reviews, scanning and account reconciliations; to engage in performing the full range of work of the unit, from basic to the most complex; to provide direction, advice, assistance, and consultation on tax processing issues and problems, and to professionally and courteously resolve such issues and problems; and to do related work as required.

SUPERVISION RECEIVED: Works under the direction of a superior with wide latitude for exercising initiative and independent judgement.

SUPERVISION EXERCISED: Plans, assigns, supervises, and reviews the work of a staff of Tax Return Processing Operators.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

Within the Department of Revenue (DOR) Division of Taxation, to act as a working supervisor and plan and supervise of the work of a team within the Tax Return Processing Section.

To plan, organize, coordinate, and supervise a staff engaged in performing a variety of mail processing, data entry functions, worklist reviews, scanning and account reconciliations.

To engage in performing the full range of work of the unit, from basic to the most complex.

To prepare, review, data enter and audit the entry of the most complex tax returns and documents and to work on review queues.

To oversee the Check 21 process and confirm checks are valid to deposit.

To provide direction, advice, assistance, and consultation on tax processing issues and problems, and to resolve such issues and problems professionally and courteously.

To check the work of operators in process and upon completion to ensure conformance to directions, speed, accuracy, and maintenance of production standards.

To train staff members and to routinely evaluate their performance to secure effective work results.

To exercise initiative and independence in the performance of effective tax return processing operations which comply with policies and procedures.

To address and rectify worklist(s) for suspended items that require additional research from sources other than the scanner.

To assist in identifying worklists to assign based of other section priorities.

To lead the research and work to resolve all bad records, and in the most complex cases, to work directly with taxpayers and financial institutions to get payments to post.

To identify transactions that are reversed by the bank or a financial institution and to update deposit totals.

To monitor tasks performed by subordinate staff to ensure compliance with applicable laws, policies and procedures, and to communicate areas of concern to a superior.

To assist in conducting in-service training programs relating to data entry/verification operations and procedures.

To identify and update refund deposit source(s) for income tax refunds that cannot be processed electronically.

To make recommendations to the Tax Return Processing Section that will make procedures more efficient.

To assist the programming unit in setting up new procedures.

To provide a variety of technical assistance to taxpayers in areas of Rhode Island personal income tax and Rhode Island business corporation tax.

As assigned, to perform duties in such areas as collections or audits which are commensurate with the duties above.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGE, SKILLS AND CAPACITIES: Thorough knowledge of and the ability to interpret and rapidly recall various state tax laws, regulations, practices and procedures; advanced knowledge of the forms, processes and transactions of an assigned tax section; advanced knowledge of collection processes and payment methods; an advanced ability to data enter tax forms with speed and accuracy; the ability to resolve a wide variety of taxpayer problems and inquiries; the ability and judgement to ensure that the tax laws, regulations and procedures are interpreted with consistency and equity for all taxpayers; advanced problem-solving and analytical skills; the ability to analyze and document data and information; the ability to effectively and efficiently communicate the needs of the department to stakeholders; the ability to clearly convey a variety of information in person, by telephone or by e-mail; the ability to utilize computer software and databases in completing tax transactions and interpreting data; advanced knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; an advanced ability to interact with taxpayers, the public and co-workers in a professional, tactful and courteous manner; the ability to follow verbal and written instructions and to review and enter tax-related forms and documents; the ability supervise, guide, coach, and train staff; the ability to effectively communicate with external clients and internal teams; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Possession of an Associate's degree from a college of recognized standing; and

Experience: At least five (5) years of employment involving the supervision of a large staff responsible for handling, sorting, processing, and reporting on a variety of tax return documentation.

Or, Possession of an Associate's degree from a college of recognized standing and at least six (6) years of employment involving the supervision of a large staff responsible for handling, sorting, processing and reporting on incoming mail for a large governmental or private employer.

Class Created: November 21, 2021